

THE STATE BAR OF CALIFORNIA
Trusts and Estates Section
Presents

The Thirtieth Annual Fall Program



November 10, 2006

LAX Hilton Hotel

5711 West Century Boulevard

Los Angeles, CA 90045

8:15 am to 5:15 pm.

**Online registration now available at
www.calbar.ca.gov/trusts**

8.0 CLE Units

The State Bar of California and the Trusts and Estates Section certify that this activity has been approved for MCLE credit by the State Bar of California in the amount of 8 hours.

THE THIRTIETH ANNUAL FALL PROGRAM

Presented by
The Trusts and Estates Section of the State Bar of California

November 10, 2006 • Los Angeles

LAX Hilton Hotel • 5711 West Century Blvd., Los Angeles, CA 90045

8:15 a.m. to 5:15 p.m. • Registration begins at 7:45 a.m.

REGISTRATION INFORMATION PROGRAM MATERIALS

DEADLINE: Your form and check, payable to The State Bar of California, or credit card information must be received by November 1, 2006. **Please register early because space is limited.**

MAIL TO: Program Registrations, The State Bar of California, 180 Howard Street, San Francisco, CA 94105. Make checks payable to The State Bar of California.

FAX TO: Program Registrations at (415) 538-2368. Credit card information is mandatory.

REGISTER ONLINE Online registration can be accessed at www.calbar.ca.gov/trusts. Deadline for registration is five (5) working days before the program.

ON-SITE REGISTRATIONS: On-site registration is on a space available basis only.

QUESTIONS: For registration information, please call (415) 538-2206.

REFUNDS: All requests for refunds must be in writing and received by September November 1, 2006.

SPECIAL ASSISTANCE: Please call (415) 538-2206 for special assistance or (415) 538-2231 TDD for speech and hearing impaired.

PROGRAM AGENDA

8:15 to 10:15 Annual Probate, Trust, Guardianship, Conservatorship Recent Developments

James R. Birnberg, Esq.,

Oldman, Cooley, Leighton, Sallus, Gold & Birnberg LLP, Los Angeles

Jeremy B. Crickard, Esq., Luce, Forward, Hamilton & Scripps LLP

This panel will present its annual presentation of California & statutory changes, as well as recent federal estate and gift tax developments.

10:30 to 11:30 Fiduciaries, Fraud, and Forensics

Andrew M. Wallet, Hinojosa & Wallet, Los Angeles

Lynard C. Hinojosa, Hinojosa & Wallet, Los Angeles

Jennifer Ziegler, Gurse, Schneider & Company, LLP, Los Angeles

This panel will review methods for handling litigation related to trustee misdeeds, discovery what happened, use of forensic accountants, building the damage assessment, strategy and tactics, surcharge, getting attorneys' fees.

11:30 to 1:00 LUNCH PRESENTATION featuring Honorable Aviva K. Bobb, Supervising Probate Judge, Los Angeles Superior Court "The Future of Conservatorships"

1:00 to 3:00 Long Term Care Planning Strategies Under New Federal and California Law and Regulations

Peter S. Stern, Palo Alto

Neil A. Harris, Chico

Presenters will provide an overview of the Medi-Cal program after the 2005 Deficit Reduction Act, with suggested planning strategies for single and married persons.

3:15 to 5:15 Preventing Malpractice in the Estate Planning and Administration Arena: Tips to Sleep Soundly at Night

Robert E. Temmerman, Temmerman & Cilley LLP, San Jose

Guy D. Calladine, Carlson Calladine & Peterson LLP, San Francisco

Bradley A. Bening, Willoughby Stuart & Bening, Santa Clara

Attorneys who practice in the trust and estate field are now in one of the highest risk areas of law for attorney malpractice. Managing that risk is imperative to a successful career. A plaintiff's attorney, a malpractice defense counsel and an expert witness who collectively have been involved in hundreds of attorney malpractice cases in the estate and trust field will share their practice tips for staying below the radar screen.

REGISTRATION FORM

THE THIRTIETH ANNUAL FALL PROGRAM

PRESENTED BY

THE TRUSTS & ESTATES SECTION OF THE STATE BAR OF CALIFORNIA

Note: One Registrant per form. Photocopies may be used.

State Bar Number _____

Name _____

Firm _____

Firm Address _____

City, State _____ Zip Code _____

Phone _____

Fax _____

E-mail _____

* Required for email confirmation

Your Name and Address may be disclosed.

☐ Check here if you do not want your information released.

REGISTRATION FEES (Check the appropriate box)

☐ \$275 **Trusts and Estates** Section Member

☐ \$345 Non-Section Member
Includes enrollment in the Trusts and Estates Section for 2007.

CREDIT CARD INFORMATION

I/We authorize The State Bar of California to charge my/our program registration to my/our VISA/MasterCard account. (No other credit card will be accepted.)

Account Number _____ Exp. Date _____

* VISA or MasterCard Only

Card Holder's Name _____

Cardholder's Signature _____

DEADLINE In order to Pre-register, your form and check, payable to the **State Bar of California**, or credit card information, must be received five (5) working days before the program.

REGISTER ONLINE www.calbar.ca.gov/trusts

MAIL TO Program Registrations, State Bar of California, 180 Howard Street, San Francisco, CA 94105.

FAX TO Program Registrations at (415) 538-2368. In order to fax your registration, credit card information is **MANDATORY**. (*Photocopies of checks will not be accepted*).

CANCELLATION/REFUND POLICY All requests for refunds must be received in writing no later than November 1, 2006. Refunds will not be made for requests received after November 1, 2006.

THE THIRTIETH ANNUAL FALL PROGRAM

This one day comprehensive program will include the following panels:

- Annual Probate, Trust, Guardianship, Conservatorship Recent Developments
- Fiduciaries, Fraud, and Forensics
- Long Term Care Planning Strategies Under New Federal and California Law and Regulations
- Preventing Malpractice in the Estate Planning and Administration Arena

